

## How to use:

Note: This template was created with Microsoft Word. Follow the prompts (in [...] brackets).

## Instructions

1. When the template is complete, the document can be printed and approved.
2. Prior to printing, you should delete all [...] prompt text.
3. Save the document by selecting the "Save As" command. You must specify your own directory for your project.

## Quality criteria

Once the document is complete check it against the quality criteria below. (Note: these quality criteria are taken from *Managing Successful Projects with PRINCE2 (Axelos Limited. (2017). Managing Successful Projects with PRINCE2 (6th Edition). London: The Stationery Office Ltd.)*).

- The PID correctly represents the project.
- It shows a viable, achievable project that is in line with corporate, programme management or customer strategies or overall programme needs.
- The project management team structure is complete, with names and titles. All the roles have been considered and are backed up by agreed role descriptions. The relationships and lines of authority are clear.
- If necessary, the project management team structure shows to whom the project board reports.
- It clearly shows a control, reporting and direction regime that can be implemented, appropriate to the scale, risk and importance of the project to corporate, programme management or the customer.
- The controls cover the needs of the project board, project manager and team managers and satisfy any delegated assurance requirements.
- It is clear who will administer each control.
- The project objectives and approaches are consistent with the organization's social responsibility directive, and the project controls are adequate to ensure that the project remains compliant with such a directive.
- Consideration has been given to the format of the PID. For small projects a single document is appropriate.
- For large projects, it is more appropriate for the PID to be a collection of stand-alone documents. The volatility of each element of the PID should be used to assess whether it should be stand-alone (e.g. elements that are likely to change frequently are best separated out).

*Insert project name*

Project initiation documentation

Date: 24 July 2023

## Project initiation documentation

**Project:**

Release:

Date:

Author:

Owner:

Client:

Document Ref:

Version No:

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## **2 Project definition**

[This explains what the project needs to achieve. It should include:

- Background
- Project objectives and desired outcomes
- Project scope and exclusions
- Constraints and assumptions
- The user(s) and any other known interested parties
- Interfaces]

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## **3 Project Approach**

[Defines the choice of solution and delivery approach that will be used in the project. It must deliver the business option selected from the business case, taking into consideration the operational environment into which the solution must fit]

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## **4 Business case**

[Describes the justification for the project based on estimated costs, risks and benefits]

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## **5 Project management team structure**

[A chart showing who will be involved with the project]

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## **6 Role descriptions**

[These describe the roles of those in the project management team and any other key resources]

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## **7 Quality management approach**

[Describes the quality techniques and standards to be applied, and the responsibilities for achieving the required quality levels]

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## **8 Change control approach**

[Describes how and by whom the project's products will be controlled and protected]

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## **9 Risk management approach**

[Describes the specific risk management techniques and standards to be applied, and the responsibilities for achieving an effective risk management procedure]

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## **10 Communication management approach**

[Defines the parties interested in the project and the means and frequency of communication between them and the project]

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## **11 Project plan**

[Describes how and when the project's objectives are to be achieved, by showing the major products, activities and resources required on the project. It provides a baseline against which to monitor the project's progress management stage by management stage]

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## **12 Project Controls**

[Summarises the project-level controls such as management stage boundaries, agreed tolerances, monitoring and reporting]

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## **13 Tailoring of PRINCE2**

[A summary of how PRINCE2 will be tailored for the project]